CJA eVoucher Associates Functionality for Attorneys

This document explains the features of the Associates functionality in CJA eVoucher. Follow local policies where applicable.

The new associates functionality in the eVoucher applications allows an appointed attorney using the services of an associate attorney to add claims for services and expenses to their own CJA 20/30. To do this, the appointed attorney must contact the court or federal defender’s office to ensure the associate attorney is set up in eVoucher and to have the associate attorney added to the appointment. Once completed, an attorney having an associate on their appointment may add associate services and expenses to a CJA 20/30 and submit together with their own services and expenses on the same voucher.

Current Vouchers

Attorneys and courts can process vouchers on associate appointments created before v5.2 for 90 days after the deployment to production. After this time, all new associates must be created as an associate on the voucher and processed the new way.

Creating a CJA 20/30 with an Associate

Payments are always made to the appointed attorney's preferred payee billing selected on the Basic Info tab of the CJA 20/30.

1. On the Home page, select a case from the Appointments’ List grid.

Figure 1: Billing Code
2. In the CJA-20 (or CJA-30, if the case is a Capital Case) section, click **Create**.

Figure 2: Appointment Info Page

3. In the **Associate Info** section, select the level of access (below) for this voucher that the associate attorney has, if any. Payment for this voucher still goes to the selected preferred payee.

   a. **Not on Voucher**: This voucher does not include any claims for services and/or expenses for the associate attorney.

   b. **On Voucher, No Edit**: This voucher includes claims for services and/or expenses for the associate attorney. While the voucher is in Voucher Entry mode, the associate has read-only access. They can only view their own entries on this voucher. Only the appointed attorney can add, remove, edit, and save entries on behalf of the associate.

   c. **On Voucher, Can Edit**: This voucher includes claims for services and/or expenses for the associate attorney. While the voucher is in Voucher Entry mode, both the appointed attorney and the associate can add, remove, edit, and save their entries on this voucher. The associate always has access to only their voucher entries.

   After selecting **On Voucher, No Edit** or **On Voucher, Can Edit**, click the **Services** and/or **Expenses** tab.
4. The **Services** and **Expenses** tab include an additional **Attorney** drop-down field. If no selection is made in this field, then service or expense entries added to the voucher will be for the appointed attorney. To enter a service or expense claim for the associate, click the **Attorney** drop-down arrow and select the associate's name.

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**Figure 3: Basic Info Tab**

![Figure 3: Basic Info Tab](image1)

**Figure 4a: Services Tab**

![Figure 4a: Services Tab](image2)
Entries added for the associate are added at the rate entered by court staff when the associate was added to the appointment. The rate may be at or below the statutory hourly rate. Service and expense entries for the appointed attorney appear at the statutory rate (non-capital or capital). The Attorney column in the table indicates for whom each line item applies.

Figure 4b: Services Tab

5. Click the Claim Status tab to enter the start and end dates of the voucher, along with other information. This tab is always read-only for the associate. Submit supporting documentation on the Documents tab in PDF format.

Figure 5: Claim Status Tab
6. Click the **Confirmation** tab and then click **Submit** to send the voucher to the court. Only the appointed attorney can submit the voucher to the court.

![Confirmation Tab](image)

**Adding Services/Expenses as an Associate Attorney**

Associate appointments appear in the *My Appointments* page with the order type of **Associate For** [*the appointed attorney's name*]. Only the appointed attorney can create a voucher.

- If the associate is given **On Voucher, Can Edit** permission, they can add their services and expenses to the voucher.
- If the associate is given **On Voucher, No Edit** permission, only the appointed attorney can edit the voucher.

Associates can only see their own claims and claimed amounts on the voucher. The appointed attorney is the only one who can view the entire voucher with the combined entries.

![My Appointments](image)
1. Log in to eVoucher, and in the My Active Documents section, click the **Edit** link next to the voucher in Voucher Entry status.

   **Figure 8: My Active Documents Section**

   ![My Active Documents Section](image)

2. The **Basic Info** tab contains read-only information about the case and appointed attorney. The appointed attorney is the only person who can upload documents and submit the voucher; therefore, the voucher does not include the **Documents** or **Confirmation** tabs when viewed by the associate.

   **Figure 9: Basic Info Tab**

   ![Basic Info Tab](image)
3. Click the **Services** tab to add services. Complete the required fields and click **Add**. If there are expenses to be claimed, click the **Expenses** tab. Complete the required fields and click **Add**.

**Figure 10a: Services and Expenses Tabs**

When all service and expense items have been added to the voucher, click **Save**. The appointed attorney will submit the voucher to the court when ready. After the voucher is submitted to the court, it may still be accessed from the **Appointment Info** page, but will be read-only.

**Figure 10b: Services and Expenses Tabs**
Addendum

Applicable reports for associates are listed below:

- Appointments with Associates Report